

FINANCIAL SERVICES PROFESSIONAL APPRENTICESHIP

Program Number: 50-114-1

Apprenticeship

Campus: Beaver Dam, Fond du Lac, West Bend, Online

This program is **not** eligible for financial aid

About the Program

A financial services professional identifies prospective individuals and businesses to uncover needs, and implements strategies to meet client needs, and create and advise on financial plans.

What You'll Learn

Students will learn about financial products and services, lending regulations and practices, client relationship management, and marketing and brand management.

Additional Information

Learn more at www.wisconsinapprenticeship.org (<https://dwd.wisconsin.gov/apprenticeship/>)

Application/Admission Information

Students interested in an apprenticeship do not complete standard admissions with Moraine Park.

Interested students/employers should contact the training representative listed below to start the apprentice/employer apprenticeship contract application:

Lavelle Gill, Apprenticeship Training Representative

Phone: (262) 340-1143

Email: almonl.gill@dwd.wisconsin.gov

Learn more at www.wisconsinapprenticeship.org (<https://dwd.wisconsin.gov/apprenticeship/>)

Application Requirements

Registered Wisconsin Apprentice

Special Provisions: Complete Series 6 Certification

Minimum Qualifications:

- Be at least 18 years of age
- Have a high school diploma, GED or equivalency
- Have a valid government-issued photo identification

Approximate Costs

Tuition

Occupational

- \$149.50 per credit (resident)
- \$224.25 per credit (out-of-state resident)

Associate of Arts/Associate of Science

- \$188.90 per credit (resident)
- \$283.35 per credit (out-of-state resident)

Online students are not charged out-of-state fees.

Student Fees

- \$5.00 minimum per course Material Fee
- \$13.45 per-credit Supplemental Fee for Undergraduate courses
- \$4.50 per term mandatory Student Accident Insurance Fee

Please refer to Tuition & Fee Information (<https://catalog.morainepark.edu/admissions-registration/tuition-fee-information/>) for additional enrollment fee information.

Training Period

- 1-year apprenticeship under the hybrid model (both time-based and competency-based)
- 2,000 hours on-the-job training
- 144 hours of paid related instruction
- Complete Transition to Trainer course in the final year

Working Conditions

Financial services professionals generally work in an office environment and spend most of their time using computers and viewing computer monitors.

Course Requirements

Course	Title	Credits
Year 1		
Semester 1		
114-101	Financial and Insurance Fundamentals	1
114-103	Financial Service Lines	3
Credits		4
Semester 2		
104-102	Marketing Principles	3
114-109	Securities Industry - Concepts to Compliance	3
Credits		6
Total Credits		10

Students must take course 47-455-455 Transition to Trainer, Your Role as a Journeyworker (complete in the final year).

Program Outcomes

- Prospect for business
- Convert prospects to clients
- Manage client relationships
- Maintain ongoing professional development
- Maintain compliance documentation

Career Opportunities

- Financial Planner
- Financial Advisor
- Service Representative
- Investment Advisor

- Wealth Management Advisor
- Insurance Agent
- Financial Representative